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## Alcohol Sales Down On Prem for Memorial Day Wknd; Beer Outperformed Spirits, BeerBoard Sez; RTDs and NAs Up Double Digits

While total alc bev sales on-premise dropped 4.4% over Memorial Day weekend, there were some notable bright spots, particularly in beyond beer categories, BeerBoard reported today. Looking at same store sales for 4-day period Friday-Monday, draft beer saw a 3.9% YoY decline, “showing resilience” compared to packaged beer on premise (-6%), while RTDs rose 21.3% by volume and NA bevs were up 18.5%. In total, beyond beer sales (including canned cocktails, hard seltzer and non-alc) were up 5.3% by volume, driving many of the gains in what is still a difficult environment.

Amid general declines, tho, even some of the “bad” news looks better compared to where we were just a month ago. To wit, packaged beer was down 6% YoY for Memorial Day weekend, which is a significant jump from the 17% drop tracked just a few weekends ago for Kentucky Derby/Cinco de Mayo weekend. And beer significantly outperformed spirits for the holiday weekend as spirits (ex RTDs) sank 13.7% vs yr ago in BeerBoard data. Notably, tequila fell 19.3% YoY. Whiskey fell 5.7% tho increased volume share by 9.3%. Tho keep in mind, BeerBoard primarily tracks beer-centric chains like Buffalo Wild Wings.

***Bud Light, Guinness and Pacifico Show Big Gains on Draft; Miller Lite Makes Jump*** A relatively strong performance for draft beer was highlighted by Miller Lite leapfrogging Modelo Especial to become #2 brand for weekend behind Mich Ultra. Bud Light was 4th, up a spot from '24, with a notable 17.4% increase in volume YoY. Coors Light was 5th. Outside the top 10, Guinness continues to show strength, up 17.3% in total volume, while Pacifico rose 29.8%. Contrary to tracked off-prem channels, imports were strongest subcategory in draft, down only 1.2%, while craft struggled, down 6.1%. Domestic draft volume declined 3% but gained share.

***Package Bright Spots? Beyond Beer, Busch Light*** While Corona Extra was the #1 packaged product for the weekend, it was down 13.8% in units sold. By comparison, White Claw Hard Seltzer Black Cherry, the top-performing non-beer product, grew volume share, while High Noon Sun Sips Pineapple volume was up 20%. It's not all bad news for beer, tho: Busch Light was up 16.4% in volume. Busch Light's surge especially impressive given that domestic packaged volume was down 4.8%. Notably, imported packages slipped 9.9%. Only beyond, at +5.3%, showed growth.